



# Statewide Health Insurance Advisors: Volunteer Survey

## for the Office of the Insurance Commissioner

**April 2010**

Submitted by:

**SESRC**

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# **Statewide Health Insurance Benefits Advisors: Volunteer Survey for the Office of the Insurance Commissioner**

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April 2010



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## ABOUT SESRC

The Social and Economic Sciences Research Center (SESRC) at Washington State University is a recognized leader in the development and conduct of survey research.

SESRC-Puget Sound Division provides technical services and consultation to assist clients in acquiring data, understanding what data means, and applying that information to solving problems. The SESRC Puget Sound Division specializes in research design, data collection and analysis, using both qualitative and quantitative methods. The Division also provides interpretive reports, policy studies, presentations and consulting services directly to individual clients, organizations and consortia.

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## ACKNOWLEDGEMENTS

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# TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	i
INTRODUCTION .....	1
METHODOLOGY .....	1
Survey Protocol Development.....	1
Sample Selection.....	1
Survey administration.....	2
Response rates.....	2
FINDINGS .....	3
DESCRIPTION OF SURVEY RESPONDENTS .....	3
Primary Role.....	4
Funding Status .....	4
Sponsoring Organization.....	5
Overall Satisfaction .....	6
Satisfaction with Training .....	8
Satisfaction with Tools and Resources .....	10
REFLECTIONS ON THE VOLUNTEERS' EXPERIENCES.....	12
The Primary Reason for Becoming a Volunteer.....	12
What Respondents Like about Being a SHIBA Volunteer .....	14
The Most Helpful Tools and Resources .....	16
Suggested Changes in Tools and Resources .....	17
Suggested Changes to the SHIBA Program .....	19
CONCLUSIONS .....	20
APPENDIX A: SURVEY PROTOCOL.....	21

APPENDIX B: DETAILED METHODOLOGY, CASE DISPOSITION AND RESPONSE RATES .....	24
Detailed Methodology .....	24
Response Rates & Case Disposition .....	25

## LIST OF FIGURES

Figure 1: Respondents by Primary Role .....	4
Figure 2: Respondents by Funding Status .....	4
Figure 3: Respondents by Sponsoring Organization .....	5
Figure 4: Overall Satisfaction.....	6
Figure 5: Overall Satisfaction by Funding Status .....	6
Figure 6: Overall Satisfaction by Primary Role .....	7
Figure 7: Overall Satisfaction by Sponsoring Organization .....	7
Figure 8: Satisfaction with Training .....	8
Figure 9: Satisfaction with Training by Funding Status .....	8
Figure 10: Satisfaction with Training by Primary Role.....	9
Figure 11: Satisfaction with Training by Sponsoring Organization.....	9
Figure 12: Satisfaction with Tools & Resources .....	10
Figure 13: Satisfaction with Tools & Resources by Funding Status.....	10
Figure 14: Satisfaction with Tools & Resources by Primary Role .....	11
Figure 15: Satisfaction with Tools & Resources by Sponsoring Organization .....	11
Figure 16: Primary Reason for Becoming a Volunteer .....	12
Figure 17: Primary Reason for Becoming a Volunteer by Funding Status.....	14
Figure 18: Most Helpful Tools & Resources .....	16

# EXECUTIVE SUMMARY

## Statewide Health Insurance Benefits Advisors: Volunteer Survey

### For the Office of the Insurance Commissioner

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WASHINGTON STATE UNIVERSITY

APRIL 2010

Washington's Statewide Health Insurance Benefits Advisors (SHIBA) program , operated by the Office of the Insurance Commissioner (OIC), is a source of free information about health care coverage and access. This information is primarily delivered through a network of volunteers who provide one-on-one consultations. In January 2010, OIC contracted with Washington State University's Social and Economic Sciences Research Center (SESRC) to conduct a phone survey of their volunteers.

The goal of the survey was to obtain information about the volunteers' experiences. OIC wished to identify the elements of volunteer satisfaction that contributed to its high volunteer retention rate and to improve future volunteer recruitment. SHIBA also wished to know what volunteers would suggest changing. The volunteers contributed feedback about a variety of topics, including the following:

- The level of satisfaction with their SHIBA volunteer work
- What they like about volunteering with SHIBA
- Suggestions for improving the program

By the end of the calling period, the survey achieved an overall response rate of 60 percent (239 completed interviews).

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## DESCRIPTION OF SURVEY RESPONDENTS

Survey results were analyzed by several factors, including the volunteer's primary role within SHIBA (described by the duties they usually performed), their sponsoring organization, and their funding status (whether they are paid or not). This section provides a description of the volunteers by these three factors used in the breakdowns of results.

- **Primary Role:** SHIBA volunteers performed many functions. The majority (71%) were “counselors”, providing one-on-one advice about insurance benefits. The remaining volunteers were split between outreach/public speaking (14%), CATS data entry (6%), and other administration (9%).
- **Funding Status:** Roughly three-quarters of the respondents were unpaid volunteers (77%) and one-quarter were in-kind volunteers, paid by their sponsoring organizations (23%).
- **Sponsoring Organization:** The volunteers in the sample pool were affiliated with 21 different sponsoring organizations. The sponsors with the largest proportion of survey responses were Senior Services of Seattle King County (18%) and Aging and Long Term Care of Eastern Washington (10%).

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## SATISFACTION RATINGS

Respondents rated their overall satisfaction with their work as a SHIBA volunteer, whether they received adequate training, and whether they had access to adequate tools and resources to do their work. Taken as a whole, the satisfaction ratings were very positive, regardless of the volunteers' funding status, primary role, or sponsoring organization.

- **Overall Satisfaction:** Respondents reported extremely high levels of satisfaction with their work as a SHIBA volunteer. Ninety percent of the respondents indicated that they were satisfied or very satisfied. Only 2 percent were dissatisfied, and a single respondent reported being very dissatisfied. The remaining 8 percent were neutral.
- **Satisfaction with Training:** The volunteers strongly indicated that they had the training they required. Ninety-three percent of the respondents agreed with the statement, “I have received adequate training to do my volunteer work.” Indeed, 69 percent strongly agreed with the statement. Only three percent disagreed with the statement, indicating that they had not received adequate training.
- **Satisfaction with Tools and Resources:** Regarding the provision of tools and resources, volunteers strongly agreed that they had what they need to do their work. Ninety-two percent agreed with the statement, “I have the tools and resources I need to do my volunteer work.” Five percent indicated that they did not have the necessary tools and resources. In the open-ended comments, some respondents requested additional fliers and hand-outs to send to clients.



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## REFLECTIONS ON THE VOLUNTEERS' EXPERIENCES

This section discusses the open-ended responses. These include the primary reason respondents became volunteers, what they liked best about volunteering, the tools and resources they found most helpful, suggestions for modifications to the tools and resources, and ideas for changes to the SHIBA program itself.

- **Primary Reason for Becoming a Volunteer:** The most common reason volunteers provided for joining the program was *to help others* (49%), followed by *wanting to gain the knowledge and training provided by SHIBA* (19%). Other volunteers participated in SHIBA because *it is a part of their job* (12%). These are primarily in-kind volunteers. Ten percent of the volunteers cited *personal enjoyment* as the main factor in their decision to become a volunteer, and 10 percent had an “other” reason, such as a friend or neighbor suggesting it to them.
  - As expected, the in-kind volunteers were much more likely to say that they joined because it’s a part of their job (by 29 percentage points). Unpaid volunteers were much more likely to state that they wanted the knowledge and training (by 17 percentage points).
- **What Respondents Like about Being a SHIBA Volunteer:** There were many strong themes among the responses, including the following: Volunteers enjoyed helping others; having/acquiring knowledge; the work itself; relationships with peers, supervisors, and members of the community; the flexibility of the position; and working with a well-run program.
- **The Most Helpful Tools and Resources:** The interviewers asked the respondents, “In your role as a SHIBA volunteer, what tools or resources do you find most helpful?” In general, the tools and resources that respondents found helpful were the training and training materials (27%), online resources (22%), printed materials (19%), mentoring (13%), computers (11%), and other resources (7%).
- **Suggested Changes in Tools and Resources:** Volunteers had many suggestions for changes and additions to the SHIBA tools and resources. In general, the suggestions fell into the following themes:
  - Simplify and streamline the paper resources
  - Modify the training: offer through distance-learning, provide more hands-on learning
  - Provide more resources: computers and offices
  - Reimburse mileage and other transportation expenses
- **Suggested Changes to the SHIBA Program:** When interviewers asked if the volunteers had any suggestions for the SHIBA program itself or the services it offers, the volunteers responded with a wide variety of recommendations. By far, the most common recommendation was to perform more outreach and improve public awareness of the SHIBA program. There were no other strong themes in the responses to this question.

# INTRODUCTION

Washington's Statewide Health Insurance Benefits Advisors (SHIBA) program, operated by the Office of the Insurance Commissioner (OIC), is a source of free information about health care coverage and access. This information is primarily delivered through a network of volunteers who provide one-on-one consultations. In January 2010, OIC contracted with Washington State University's Social and Economic Sciences Research Center (SESRC) to conduct a phone survey of their volunteers. The goal of the survey was to obtain information about the volunteers' experiences. OIC wished to identify the elements of volunteer satisfaction that contributed to its high volunteer retention rate and to improve future volunteer recruitment. SHIBA also wished to know what volunteers would suggest changing. The volunteers contributed feedback about a variety of topics, including the following:

- The level of satisfaction with their SHIBA volunteer work
- What they like about volunteering with SHIBA
- Suggestions for improving the program

Survey results were analyzed by several factors, including the volunteer's primary role within SHIBA (described by the duties they usually performed), their sponsoring organization, and their funding status (whether they are paid or not). These factors are discussed further in the first chapter of the report.

## METHODOLOGY<sup>1</sup>

### SURVEY PROTOCOL DEVELOPMENT

The survey protocol was developed in close collaboration with SHIBA management. The survey consisted of 10 questions, with the option to provide additional comments at the close of the survey. There were five multiple choice questions and five open-ended questions. Questions on volunteer satisfaction were designed with the intention of repeating the survey in the future and tracking trends over time.

### SAMPLE SELECTION

SHIBA provided SESRC with contact information for all current volunteers (N=459), including both in-kind (131) and unpaid volunteers (328). (SHIBA considers volunteers who receive payment by their

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<sup>1</sup> Please see Appendix A for detailed information on the methodology, case disposition, and response rates.

sponsoring organization to be “in-kind volunteers”. ) SESRC designated responses from each of these subgroups to ensure that both groups were represented in the final dataset.

Thirty-two people were deemed ineligible for the study because they either 1) indicated that they were no longer a volunteer, or 2) they considered themselves staff, not volunteers, because they received payment. These were generally deemed to be “in-kind” volunteers by SHIBA management, but they decided not to participate in the survey because they did not see it applying to them.

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## SURVEY ADMINISTRATION

The interviews were conducted from the Public Opinion Laboratory of SESRC, using a Computer-Assisted Telephone Interviewing system, Voxco Interviewer, which display survey questions on a computer monitor. The interviewer read the question to the respondent and entered the response directly into the database.

In order to maximize participation in the survey, SHIBA mailed informational letters to all volunteers in January. A pre-test of the survey was conducted with two volunteers on February 8<sup>th</sup>, 2010. The survey was officially launched on February 9<sup>th</sup>, and closed on February 18<sup>th</sup>. Callers averaged four attempts to reach each volunteer by phone during the survey period, alternating days of the week and time of the day. If an interviewer called at an inconvenient time for the respondent, the interviewer attempted to schedule a specific time to re-contact the household for an interview. The average interview length for the survey was 8.5 minutes. Five percent of the telephone interviews (13 cases) were monitored by supervisory personnel, who were able to listen to interviews on the telephone as they were being conducted.

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## RESPONSE RATES

By the end of the calling period, the survey achieved an overall *response rate* of 60 percent (239 completed interviews). Response rate is calculated by comparing the number of completed interviews to the total number of volunteers identified as interview subjects. The response rate for the unpaid volunteers was 63 percent (184), and the response rate of the in-kind volunteers was 52 percent (55).

A different measure of survey response is the *cooperation rate*, which is the percentage of volunteers who started or completed the survey compared to the total number of volunteers whom the interviewers contacted. (For example, the cooperation rate does not include the non-working phone numbers or the phone numbers with no response.) The volunteers were very willing to speak to the interviewers, leading to a cooperation rate of 99 percent.

# FINDINGS

The results are presented below in three chapters:

- **Description of Survey Respondents:** The first chapter describes the respondents according to their primary role, sponsoring organization, and funding status.
- **Satisfaction Ratings:** The second chapter focuses on the multiple choice questions. Volunteers rated their overall satisfaction with their SHIBA volunteer work, the adequacy of the training, and whether they had the necessary tools and resources to do their work.
- **Reflections on the Volunteers' Experiences:** The third chapter discusses the open-ended responses. These include the primary reason respondents became volunteers, what they liked best about volunteering, the tools and resources they found most helpful, suggestions for modifications to the tools and resources, and ideas for changes to the SHIBA program itself.

## DESCRIPTION OF SURVEY RESPONDENTS

The survey results were analyzed by several factors, as appropriate:

- **Primary role:** Volunteers perform counseling, public speaking, outreach, Client Activity Tracking System (CATS) data entry, and other administration.
- **Sponsoring organization:** The volunteers in the sample pool were affiliated with 21 different sponsoring organizations. These were collapsed into 16 categories for the analysis in order to meet the minimum of at least five respondents per category.
- **Funding status (unpaid/in-kind):** The majority of volunteers are unpaid, but roughly one-quarter are paid through their sponsoring organization. These are designated as "in-kind" volunteers.

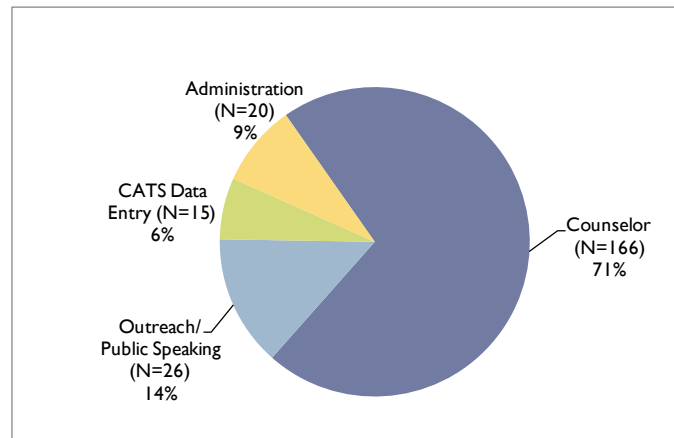
This section provides a description of the volunteers by these three factors used in the breakdowns of results.

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## PRIMARY ROLE

SHIBA volunteers performed many functions. The majority (71%) were “counselors”, providing one-on-one advice about insurance benefits. The remaining volunteers were split between outreach/public speaking (14%), CATS data entry (6%), and other administration (9%). When reviewing the survey findings, the results from the data entry and other administration should be viewed with caution due to the relatively small sample sizes.

**Figure 1: Respondents by Primary Role**

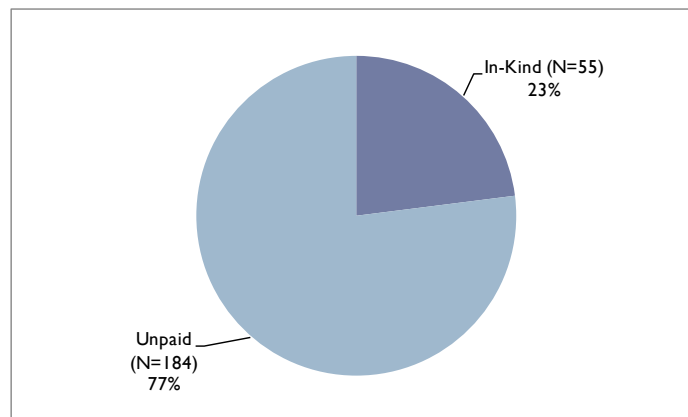


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## FUNDING STATUS

Roughly three-quarters of the respondents were unpaid volunteers (77%) and one-quarter were in-kind volunteers, paid by their sponsoring organizations (23%). In the overall population of volunteers, 71 percent were unpaid and 29 percent were in-kind. Thus, the survey results slightly overstate the opinions of the in-kind volunteers. However, the survey results were generally the same between the two groups so this small imbalance should not skew the overall results.

**Figure 2: Respondents by Funding Status**



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## SPONSORING ORGANIZATION

Volunteers were sponsored by a variety of organizations. Each sponsor generally focuses on serving a single county or geographic grouping of counties. In order to maintain confidentiality and ensure reliability of results, the categories with fewer than five respondents were grouped together to form larger categories. When reviewing the survey results, please keep in mind that some of these categories are relatively small so the results should be viewed with caution.

**Figure 3: Respondents by Sponsoring Organization**

	Frequency	Column Percentage
SENIOR SERVICES OF SEATTLE KING CO <sup>2</sup>	42	18%
AGING & LONG TERM CARE OF EASTERN WA	23	10%
SENIOR SERVICES OF SNOHOMISH CO	20	8%
COMMUNITY CHOICE HEALTHCARE NETWORK	18	8%
HUMAN SERVICES COUNCIL-CLARK CO RSVP	18	8%
SKAGIT CO PUBLIC HOSPITAL #2 <sup>3</sup>	16	7%
OLYMPIC AREA AGENCY ON AGING-SENIOR INFORMATION & ASSISTANCE	15	6%
PIERCE COUNTY AGING AND LONG TERM CARE <sup>4</sup>	12	5%
UNDISCLOSED <sup>5</sup>	12	5%
WA ID VOLUNTEER CENTER INC	12	5%
RURAL RESOURCES COMMUNITY ACTION	11	5%
RSVP OF YAKIMA	10	4%
KITSAP CO DIVISION OF AGING & LONG TERM CARE	8	3%
WHATCOM ALLIANCE FOR HEALTHCARE ACCESS	8	3%
BENTON-FRANKLIN VOLUNTEER CENTER	7	3%
SENIOR SERVICES OF ISLAND CO	7	3%
Total	239	100%

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<sup>2</sup> This category includes the Chinese Information and Service Center.

<sup>3</sup> This category includes United General Hospital.

<sup>4</sup> This category includes the Korean Women's Association.

<sup>5</sup> "Undisclosed" includes the remaining categories with fewer than five respondents: Office of the Insurance Commissioner, Lower Columbia Community Action Council, and Central WA University-Kittitas County RSVP.

## SATISFACTION RATINGS

Respondents rated their overall satisfaction with their work as a SHIBA volunteer, whether they received adequate training, and whether they had access to adequate tools and resources to do their work.

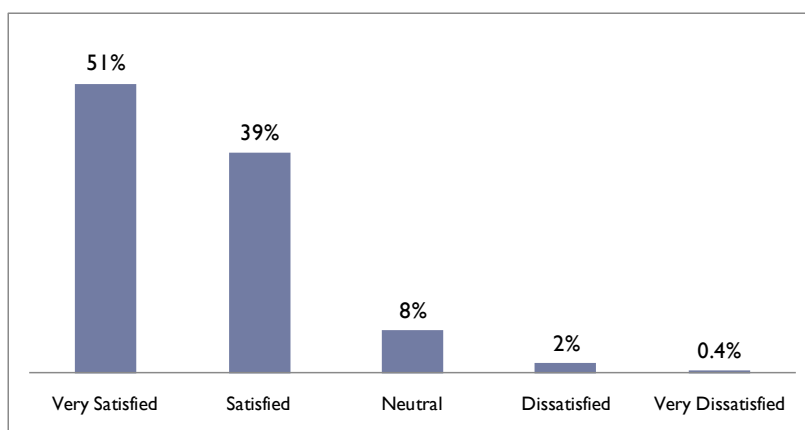
### OVERALL SATISFACTION

Respondents reported extremely high levels of satisfaction with their work as a SHIBA volunteer. Ninety percent of the respondents indicated that they were satisfied or very satisfied. Only 2 percent were dissatisfied, and a single respondent reported being very dissatisfied. The remaining 8 percent were neutral.

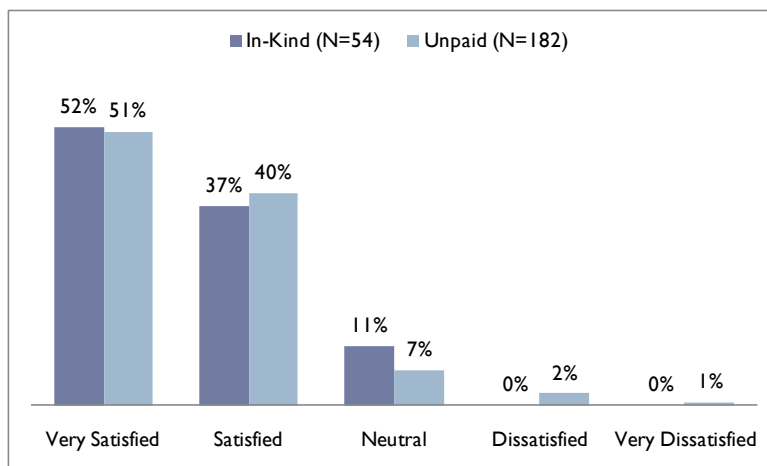
The high levels of satisfaction were consistent, regardless of the volunteers' funding status, primary role, or sponsoring organization.

The funding status of the volunteers had little effect on the levels of satisfaction; over half of each group reported that they were very satisfied with their SHIBA volunteer work (52% for in-kind and 51% for unpaid). The unpaid volunteers were slightly more likely than the in-kind volunteers to state that they were satisfied with their work (by 3 percentage points), and the in-kind volunteers were more likely to report their level of satisfaction as "neutral" (by 4 percentage points).

**Figure 4: Overall Satisfaction**



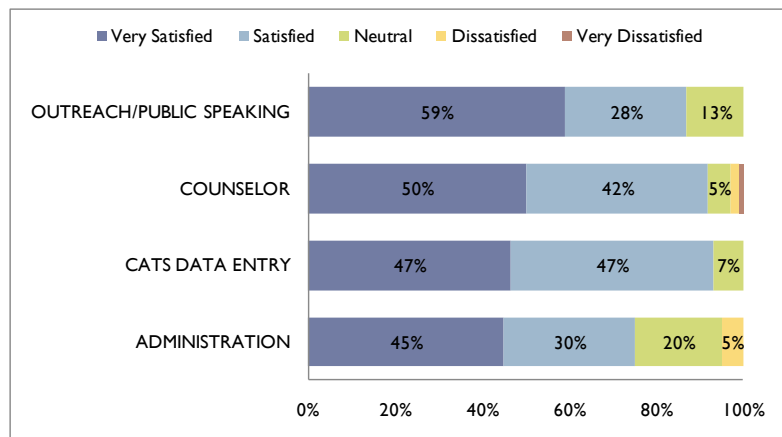
**Figure 5: Overall Satisfaction by Funding Status**



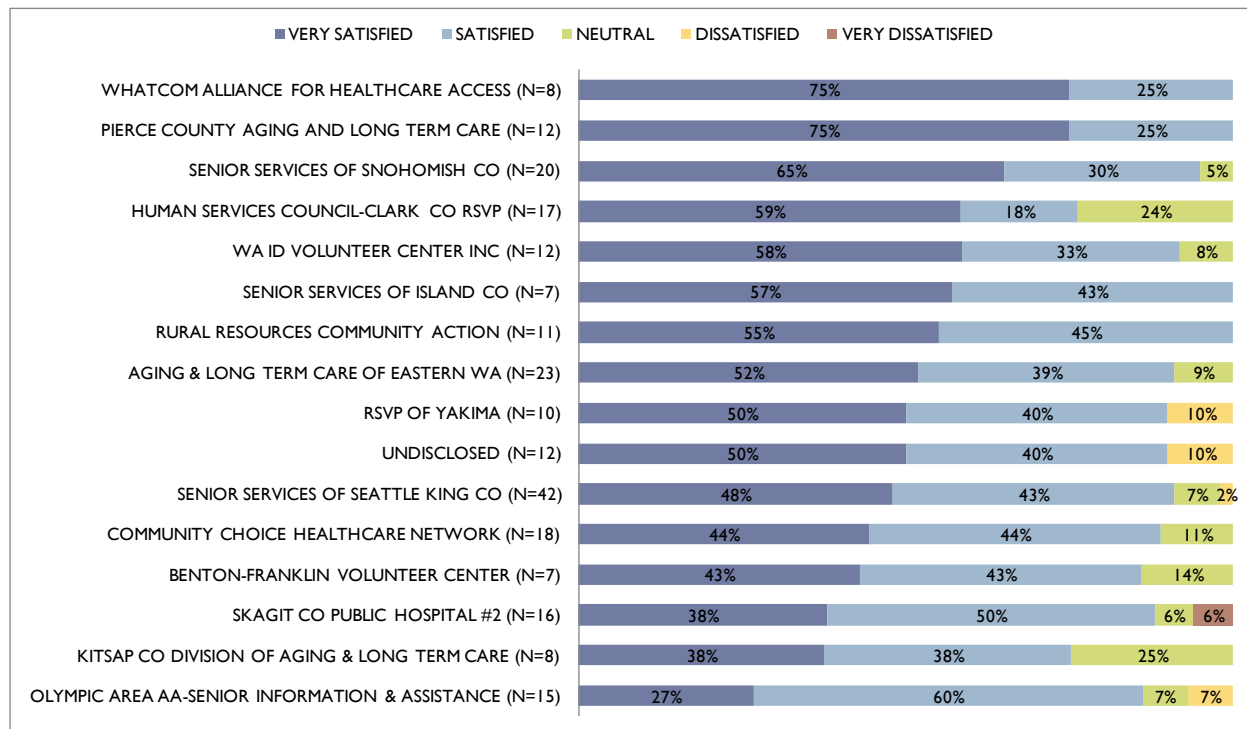
Over 75 percent of the volunteers in each primary role described themselves as being satisfied or very satisfied with their volunteer work. The highest levels of satisfaction were reported by volunteers in CATS data entry (94%) and counseling (92%). Volunteers in administration had the highest levels of “neutral” responses.

Satisfaction levels were high across all sponsoring organizations, with many organizations reporting 100% satisfied or very satisfied volunteers.

**Figure 6: Overall Satisfaction by Primary Role**



**Figure 7: Overall Satisfaction by Sponsoring Organization**





## SATISFACTION WITH TRAINING

The volunteers strongly indicated that they had the training they required. Ninety-three percent of the respondents agreed with the statement, “I have received adequate training to do my volunteer work.” Indeed, 69 percent *strongly* agreed with the statement. Only three percent disagreed with the statement, indicating that they had not received adequate training.

Training was an important topic throughout the survey, appearing in response to many of the open-ended questions. For instance, one out of every five volunteers joined specifically to gain the training. The training and training materials were cited as the most helpful tool or resource, and the training and knowledge were among the top factors

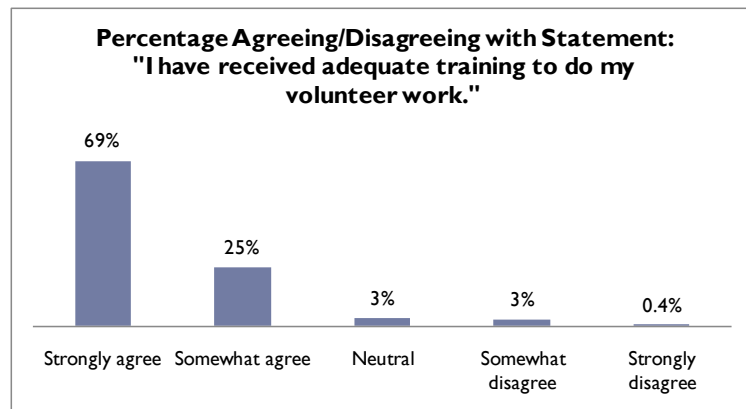
*“The training was extensive and excellent.”*

that respondents like about being a volunteer. These topics will be discussed in detail in the next chapter, *Reflections on the Volunteers’ Experiences*.

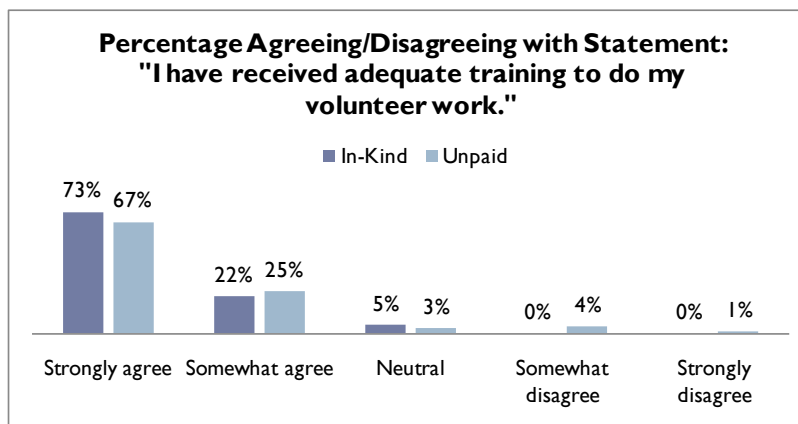
By a high percentage, both in-kind and unpaid volunteers agreed that the training was adequate (in-kind: 95% positive; volunteer: 92% positive). The main difference between the two groups was

that 5 percent of the unpaid volunteers indicated that they did *not* receive adequate training, compared to none of the in-kind volunteers.

**Figure 8: Satisfaction with Training**

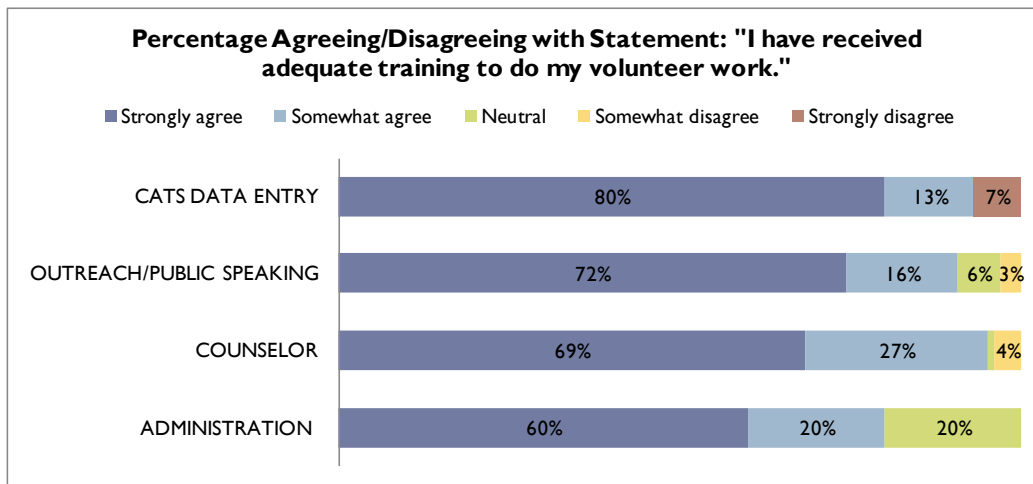


**Figure 9: Satisfaction with Training by Funding Status**



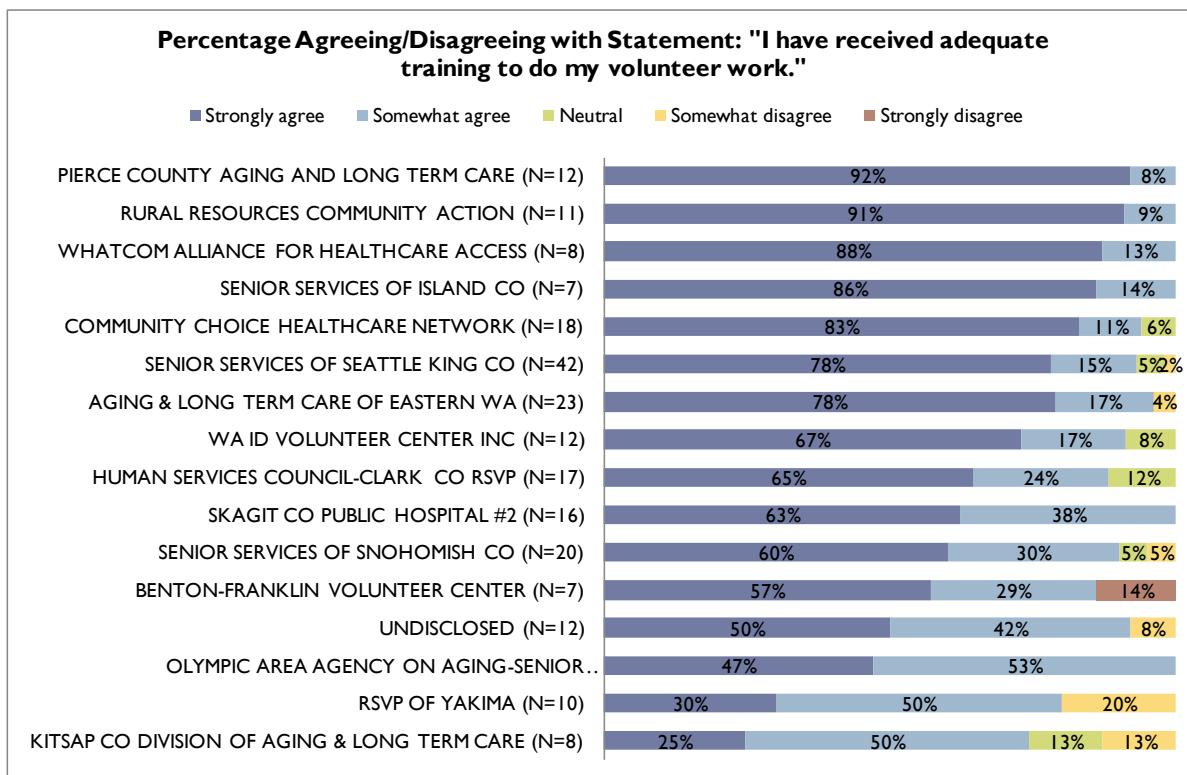
At least 80 percent of the volunteers in each role somewhat agreed or strongly agreed that they received adequate training.

**Figure 10: Satisfaction with Training by Primary Role**



Between 75 percent and 100 percent of the volunteers within each sponsoring organization agreed that it was adequate.

**Figure 11: Satisfaction with Training by Sponsoring Organization**



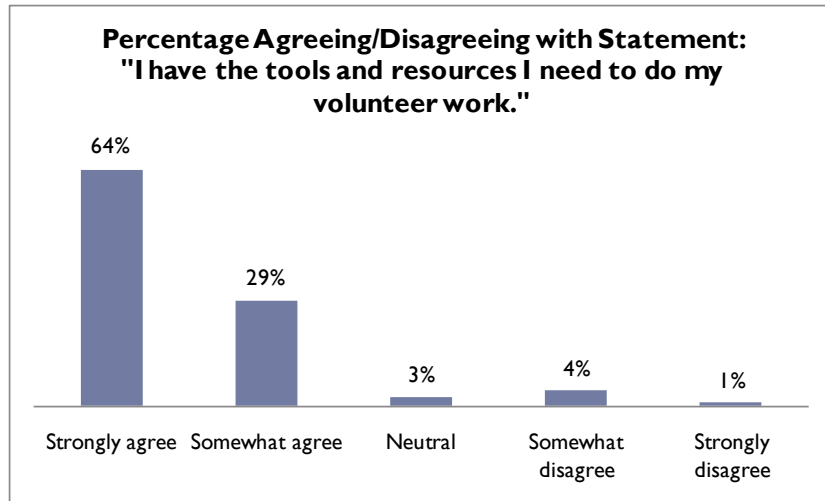
## SATISFACTION WITH TOOLS AND RESOURCES

Ninety-two percent agreed with the statement, “I have the tools and resources I need to do my volunteer work.” In fact, some volunteers noted in the open-ended comments that they actually had an overabundance of paper resources and that keeping the resources organized was a challenge. The next chapter discusses the volunteers’ opinions on the most helpful tools and resources as well as suggestions for changes to the tools and resources.

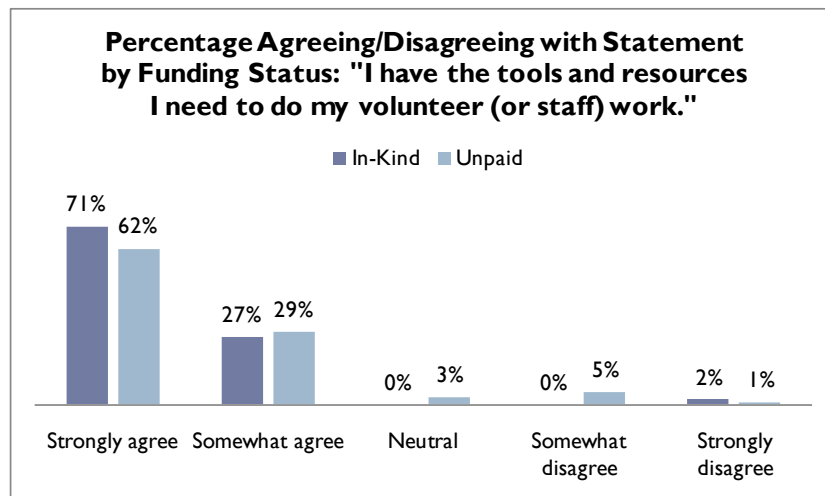
Five percent indicated that they did not have the necessary tools and resources. In the open-ended comments, some respondents requested additional fliers and hand-outs to send to clients.

In-kind volunteers were slightly more likely to indicate that they had the necessary tools and resources (98%) than unpaid volunteers (92%).

**Figure 12: Satisfaction with Tools & Resources**

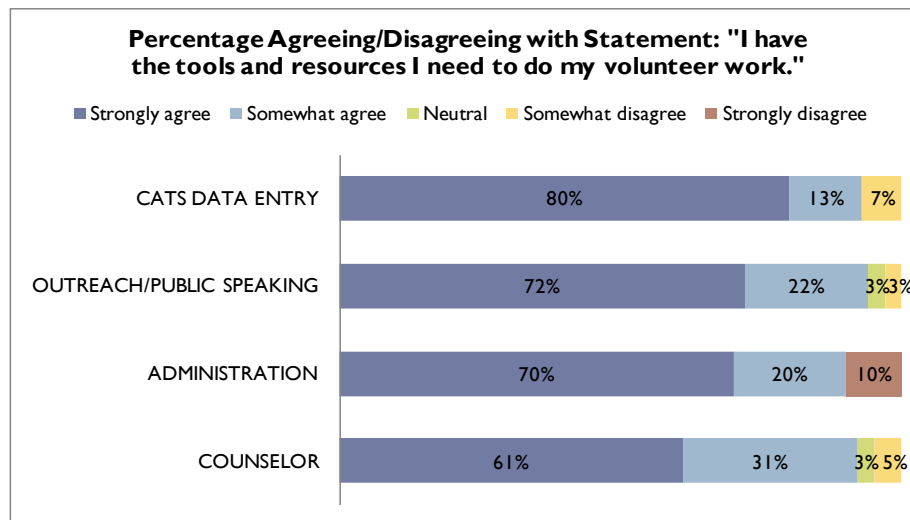


**Figure 13: Satisfaction with Tools & Resources by Funding Status**



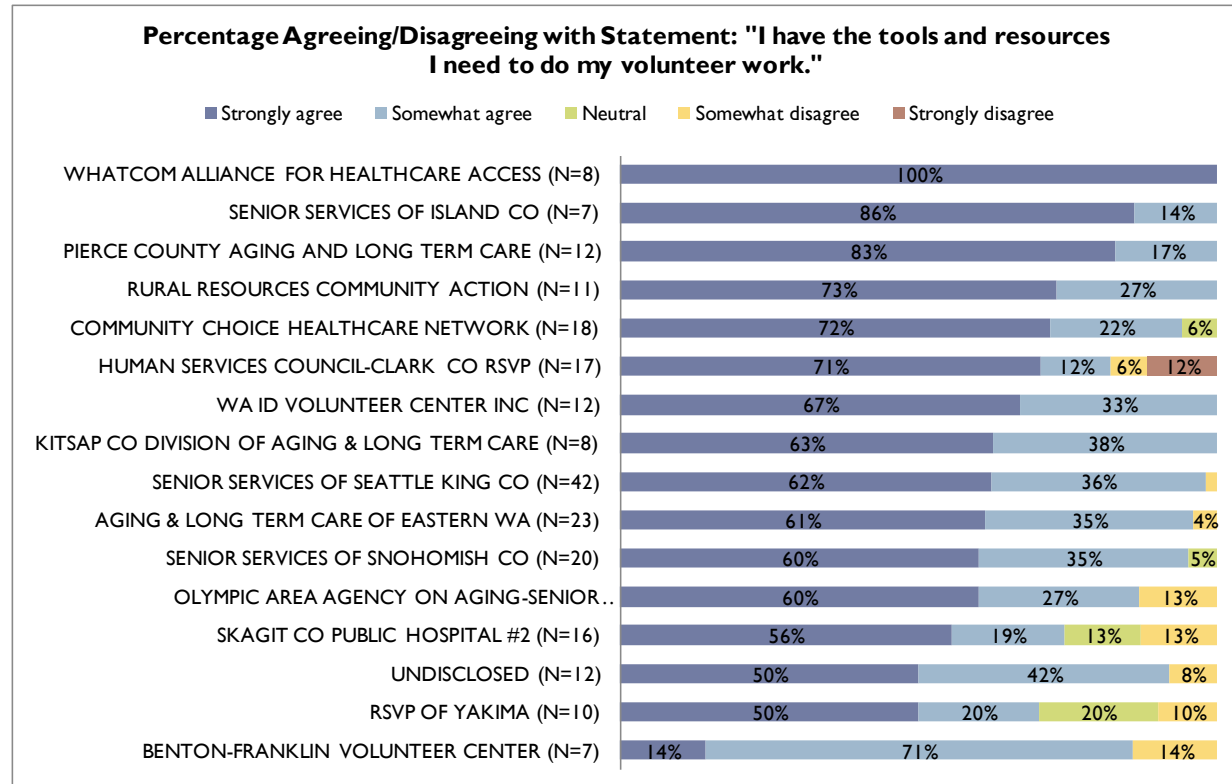
At least 90 percent of the volunteers in each role reported that they have the necessary tools and resources to do their work.

**Figure 14: Satisfaction with Tools & Resources by Primary Role**



Between 70 percent and 100 percent of the volunteers in each sponsoring organization reported that they have the tools and resources they need to do their work.

**Figure 15: Satisfaction with Tools & Resources by Sponsoring Organization**



## REFLECTIONS ON THE VOLUNTEERS' EXPERIENCES

This chapter reviews the open-ended survey questions. These questions cover the following topics:

- The primary reason for becoming a volunteer
- What respondents like about being a SHIBA volunteer
- The most helpful tools and resources
- Suggested changes to tools and resources
- Suggested changes to the SHIBA program and services

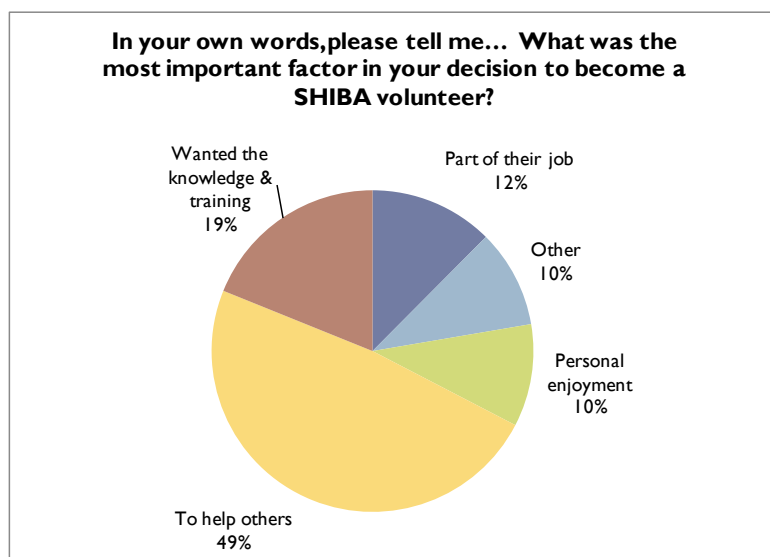
When the responses fell into a manageable number of well-defined categories, the results are presented graphically, with rough percentages in each category. When the responses were more lengthy, complex and varied, the general themes are highlighted.

### THE PRIMARY REASON FOR BECOMING A VOLUNTEER

The interviewers asked respondents “In your own words, please tell me, what was the most important factor in your decision to become a SHIBA volunteer?” While this was an open-ended question, most of the responses were in a few distinct categories.<sup>6</sup>

**Figure 16: Primary Reason for Becoming a Volunteer**

As expected, the most common reason volunteers provided for joining the program was *to help others* (49%). These volunteers mentioned wanting to help specific communities, such as non-English speakers, the elderly, and people in rural communities. Volunteers expressed frustration with the current state of the health insurance system; many of the respondents wanted to help others avoid the difficulties they had faced in finding information for themselves. A few



<sup>6</sup> Respondents who provided more than one reason for becoming a volunteer were coded in a single category. When volunteers stated both “helping others” and another reason, the response was coded as the other reason.

## Primary Reason for Becoming a Volunteer: Selected Quotations

*"My organization is connected to SHIBA, and I need updated information for the clients I serve."*

*"Payback, because they helped me a couple years ago."*

*"I wanted to reach out to the Asian community."*

*"I'm a statistical assistant by training. I'm retired and needed something to do. It fit me, and it fit them."*

*"I became a SHIBA volunteer primarily for selfish reasons. I wanted the information for myself and my family members."*

*"When I turned 65, I figured that I needed to learn something about health insurance...and I heard SHIBA was giving training. I took the training, and I got sucked in."*

respondents explained that they were originally SHIBA clients themselves, and that they wanted to pay back the program after receiving help. Many volunteers stated that they had retired from a related field and wanted to put their knowledge and skills to use. Thus it should be noted that SHIBA clients and retirees from related fields may be fruitful sources for recruiting new volunteers.

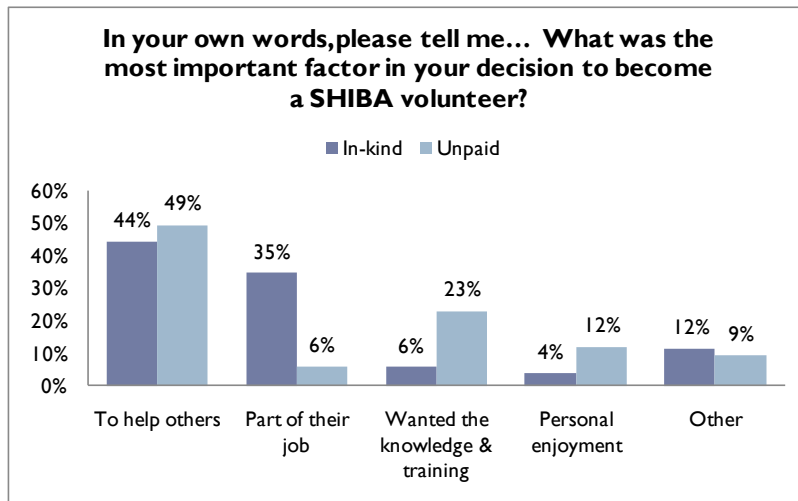
The second most common reason that respondents became a volunteer was to gain the knowledge and training that SHIBA provided (19%). Survey respondents made comments such as, "I needed insurance for myself, and I figured the best way to learn would be to volunteer."

Other volunteers participated in SHIBA because it is a part of their job (12%). These are primarily in-kind volunteers. Ten percent of the volunteers cited personal enjoyment as the main factor in their decision to become a volunteer, and 10 percent had an "other" reason, such as a friend or neighbor suggesting it to them.

When the primary reason for joining SHIBA was analyzed by the volunteers' funding status, some notable differences emerged between the in-kind and unpaid volunteers. (See Figure 17) As expected, the in-kind volunteers were much more likely to say that they joined because it's a part of their job (by 29 percentage points). Unpaid volunteers were much more likely to state that the most important factor in their decision to become a volunteer was that they wanted to knowledge and training (by 17 percentage points). Highlighting the training available to SHIBA volunteers in recruiting materials may prove to be an effective motivator for recruiting new volunteers.<sup>7</sup>

<sup>7</sup> The results for this survey question were not analyzed by primary role or sponsoring organization due to the small counts in many of the categories.

**Figure 17: Primary Reason for Becoming a Volunteer by Funding Status**



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## WHAT RESPONDENTS LIKE ABOUT BEING A SHIBA VOLUNTEER

When respondents were asked what they like about being a SHIBA volunteer, the responses contained many strong themes, including the following:

- Helping others
- Having/acquiring knowledge
- The work itself
- Relationships with peers, supervisors, and members of the community
- The flexibility of the position
- Working with a well-run program

Percentages were not produced because the responses did not fall into a few well-defined categories. Instead, the themes in the responses are identified and discussed in further detail below.

One of the strongest themes reported by respondents was that they like helping others. Just as when they were asked their primary reasons for becoming a volunteer, many respondents highlighted specific communities that they enjoyed helping (recent immigrants, non-English speakers, the elderly, those in rural communities, etc.). Volunteers also described the positive feelings engendered by seeing that their clients were satisfied with the services they received.

Another common theme was that volunteers enjoyed having the knowledge about insurance, as well as the process of acquiring the knowledge, whether through formal training or investigating clients' questions on their own. They enjoyed learning, researching, and having up-to-date information. Retirees reported that they liked being able to use the knowledge and skills they gained in their prior

employment. In-kind volunteers explained that the information they gained as a SHIBA volunteer helped them in their current employment. Volunteers made comments such as the following:

*"I like keeping up to date with all the changes in insurance in the state of Washington."*

*"It's like been a detective sometimes, and you have to track down the answers."*

*"The training to me is the best part. It is completely invaluable."*

*"It goes along with the business I do and provides additional resources. It allows me to do the business I'm in even better."*

Many volunteers stated that they enjoyed the work itself. One of the strongest themes was that the volunteers found the work to be important, necessary and meaningful. Respondents explained that they enjoyed the challenge of mastering the complex subject matter and sharing it with others. They also mentioned that they liked the variety of the work. As several volunteers explained,

*"I like helping people with something that's critical to them."*

*"It is very complex. It is rewarding, challenging, and the people appreciate what we do."*

*"[I like] the challenges at work. You feel like you're doing something important."*

The interpersonal aspect of the job was a factor that many volunteers liked. They enjoyed the collegial, positive work atmosphere with their fellow volunteers and supervisors/coordinators. Volunteers also stated that they liked working in their communities with the clients. As one volunteer stated, "I like the interaction with the people who need help. I also enjoy the camaraderie of our fellow volunteers."

A few respondents mentioned that they liked the flexibility of the position, both in hours and location. Others explained that they enjoyed working with a program that is well run. They felt that their skills were being well utilized. One respondent described his experience as follows: "The program itself is well run. . . There seems to be a lot of organization and thought put into training, utilizing and organizing volunteers."



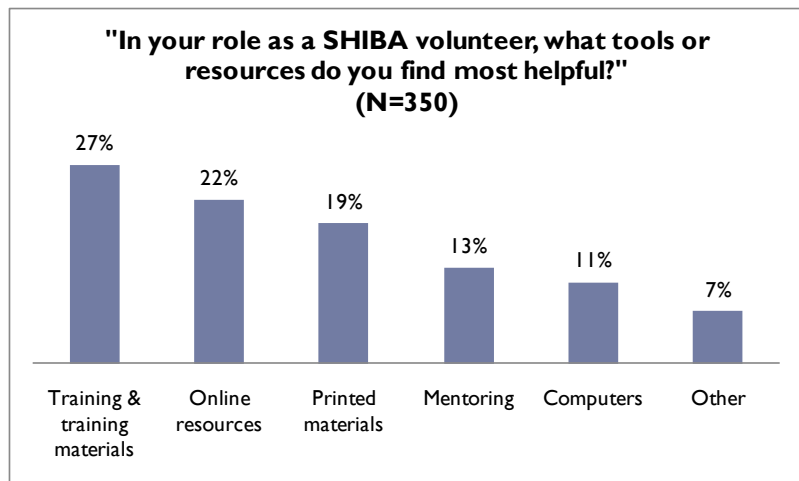
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## THE MOST HELPFUL TOOLS AND RESOURCES

The interviewers asked the respondents, “In your role as a SHIBA volunteer, what tools or resources do you find most helpful?” Most respondents listed multiple tools or resources. When analyzing the survey results, each tool or resource was counted, and percentages were created out of all of the responses (N=350). In general, the tools and resources that respondents found helpful were the training and training materials, online resources, printed materials, mentoring, and computers.

Training and training materials topped the list of most helpful tools and resources, with over one-quarter of the responses (27%). Within this category, the update meetings were the most common training resource that the volunteers mentioned as being helpful.

**Figure 18: Most Helpful Tools & Resources**



Online resources were cited as being helpful in almost one-quarter of the responses (22%). These included federal websites (8%), OIC online resources (3%), and other online resources, such as prescription drug websites (11%). Within the federal online resources, the most popular was [www.medicare.gov](http://www.medicare.gov), including Plan Finder and Benefits Check-up. As one respondent stated, “I do like the fact that if you are looking for forms or information booklets you can just go online and find it there. I think that is pretty convenient.” Respondents also mentioned a wide variety of printed materials (19%) as being helpful, such as pamphlets to hand to the clients.

Many volunteers found their peers and supervisors/coordinators to be helpful resources, termed here as “mentoring” (13%). This category was fairly evenly divided between mentoring from peers (7%) and supervisors (6%). Volunteers made comments such as the following:

*“I can rely on other people with new ideas and resources. It's a teamwork really that makes it easier to work and have support like that.”*

*“Being able to ask more seasoned people if I'm not sure of something...They're able to help me with whatever it is I need.”*

*“My director is a great resource. Whenever I have questions, she answers them for me.”*

Eleven percent mentioned their computer as a helpful tool. This category includes both the hardware and the CATS program.

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## SUGGESTED CHANGES IN TOOLS AND RESOURCES

Volunteers had many suggestions for changes and additions to the SHIBA tools and resources. In general, the suggestions fell into the following themes:

- Simplify and streamline the paper resources
- Modify the training: offer through distance-learning, provide more hands-on learning
- Provide more resources: computers and offices
- Reimburse mileage and other transportation expenses

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### Simplify Paper Resources

The strongest theme was that volunteers are overwhelmed by the amount and complexity of information and the number of separate paper resources. As one respondent stated, “There are way too many resources.” Another volunteer described the experience as follows: “We get too much paper. We get binders and binders full of tips and helpful hints and reminders. It’s way too much paper.” Volunteers had a variety of suggestions for simplifying, streamlining, and organizing the printed materials.

Respondents suggested streamlining and better organizing the paper resources to create a cohesive, comprehensive set of information. Specific recommendations included providing paper resources in binders with tabs, section headings, and page numbers. A couple respondents suggested creating a list of paper materials with version dates so volunteers can ensure their materials are complete and current. Some volunteers suggested putting all materials online in a printable format, and others suggested creating an online query system that would either respond to client questions directly or point to the correct paper resource. One respondent described it as “some kind of really clever database where you can put in a query and get an answer quickly, instead of hundreds of pieces of paper.”

Additionally, volunteers suggested simplifying the wording, charts, and tables within the printed materials. Some of the materials were described as “wordy” and “hard to read”. One respondent recommended moving from a paragraph format to using more bullet points.

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### Modify the Training

The most common suggestion for modifying the training was to offer it through methods that don’t require traveling to an in-person meeting. Options mentioned by volunteers included phone, video, tele-health, online, and CD-based training. The following quotations support these points.

*“I’m out here in the middle of nowhere, so getting away from my job... and going to training meetings is almost impossible. A tele-health session at the main hospital so I can watch a meeting would really help me.”*

*"I'd...like to advocate for CD based or online based training for working professionals who still want to volunteer."*

*"It would be nice to have a phone conference instead of having people travel for miles to come and give us updates."*

Other volunteers recommended modifying the training to add more of a "hands-on" aspect, such as through shadowing an experienced volunteer or modeling client interactions in the classroom setting. As one volunteer stated, "We kind of get thrown out there. We need a review on the phone or something else – a demonstration... or someone we can review with."

A few volunteers suggested providing cross-training with other organizations, such as the Department of Social and Human Services, Aging and Long Term Care, the Veterans Administrations, and local hospitals.

### **Provide More Resources**

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Volunteers requested more resources, specifically computers and offices. They noted that with additional desktop computers, they would not need to rely upon other peoples' computers to do their work. Laptops were requested so volunteers could be more mobile and work from multiple locations.

Respondents also requested offices in more locations to increase their ability to reach various communities. They mentioned that having bigger offices would afford "more privacy for interviews" with clients.

### **Reimburse mileage**

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The final suggestion proposed by multiple respondents was for SHIBA to reimburse the volunteers' mileage and other transportation expenses. As respondents indicate in the quotations below, many thought a formal mileage reimbursement program would help SHIBA recruit more volunteers.

*"When you're on a fixed income and not getting compensated for gas, it's hard to make the training and meetings due to the distance."*

*"I really think that we should officially have a mileage reimbursement program. I volunteer with other organizations that have official reimbursements for your car, and I think that you get more volunteers that way."*

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## SUGGESTED CHANGES TO THE SHIBA PROGRAM

When interviewers asked if the volunteers had any suggestions for the SHIBA program itself or the services it offers, the volunteers responded with a wide variety of recommendations. By far, the most common recommendation was to perform more outreach and improve public awareness of the SHIBA program. Comments included the following:

*“I would like to see more advertising to get our name out there so people know we are a resource for them.”*

*“Many people do not take advantage of it [the SHIBA program] because it is not well publicized.”*

Beyond the recommendation to improve outreach, there were no other strong themes in the responses. The remaining suggestions presented below represent a sampling of the wide array of suggestions.

- Recruit more volunteers
- Allow volunteers to...
  - Help fill in forms
  - Enroll clients in Medicare Part D
  - Do home visits
  - Specialize in helping particular types of clients (i.e. elderly, families, clients with specific language needs)
  - Attend the annual Medicare seminar
- Offer an “advocacy piece”
- Help with hospital billing
- Provide more/better help to families/people under 65
- Provide documents translated into more languages, more culturally-specific activities
- Better define how much volunteers should take on with Medicare, DSHS, etc.
- Improve communication with DSHS
- Hold regional meetings for volunteers
- Provide a way for volunteers to answer live questions at home
- Follow-up with clients to see how they use the information provided by volunteers
- Allow clients to set up appointments
- Pay for mailing supplies

## CONCLUSIONS

The feedback from the volunteers was overwhelmingly positive. This includes the overall satisfaction with their work as volunteers (90% positive), the adequacy of the training (93% positive), and the adequacy of the tools and resources (92% positive). In general, the high satisfaction ratings were reported across the board, regardless of the volunteers' primary role, funding status, or sponsoring organization.

The volunteers noted that they enjoy helping others, learning, the work itself, and their relationships with their peers and mentors. They reported that the most helpful resources were the training, online resources, and printed materials. The top volunteer suggestions were to simplify and streamline the written materials, offer training through distance-learning methods, and improve outreach and public awareness of the SHIBA program.

The training provided by SHIBA was a strong theme across many of the survey questions. Volunteers reported that it was a motivating factor in *becoming* a volunteer and *continuing* to volunteer. Highlighting the value of the training in recruiting materials may be a valuable tool for recruiting new volunteers to the program. An additional lesson learned from the survey results is that retirees from related fields and SHIBA clients may be good sources for finding new volunteers.

Overall, given the high levels of satisfaction, SHIBA can expect that volunteer participation will remain high. Similarly, however, the strong consistency of concern about the amount materials with which they work, and the thoughtful suggestions made about how to improve them, can be seen as significant suggestions for future program improvements.

# APPENDIX A: SURVEY PROTOCOL

## Telephone Survey Protocol

INTRO May I please speak to <FNAME> <LNAME>? Hello, this is (interviewer name) from Washington State University. I'm calling on behalf of the SHIBA Program. They have asked us to conduct a study to find out your opinions about your volunteer work with SHIBA. This interview should take no more than about 8 to 10 minutes.

CELL First, for safety reasons, I need to ask if this is a cellular phone? (IWR read only if necessary "By cellular telephone we mean a telephone that is mobile and usable outside of your neighborhood.")

1. Yes
2. No

CLSAF For safety reasons please tell me if you are currently driving a motor vehicle. (If yes say: "Sorry to have bothered you, we can call you back at another time." Do not take time to set a call back.)

1. Yes
2. No

CONFD This interview is voluntary and all responses are kept strictly confidential. This interview may be monitored by my supervisor to check my work. The questions take about 7 minutes to complete. If you prefer not to answer a particular question, just let me know and we can skip over it, OK?

1. Continue with survey
2. Try refusal prevention
3. Not a good time/call back later

**Begin Survey:**

1. During this interview I'll be asking questions about your volunteer work with the SHIBA HelpLine. According to SHIBA records, you are a current SHIBA volunteer. Is this correct?

Yes..... 1  
No ..... 2  
Don't know ..... D  
Refuse.....R

2. There are several roles of a SHIBA volunteer: Counselor, Public Speaking, CATS data entry, Outreach, and other Administration. Which one of these is your primary role as a SHIBA volunteer?

Counselor ..... 1  
Public Speaking ..... 2  
CATS Data Entry ..... 3  
Outreach ..... 4  
Administration..... 5  
Don't know ..... D  
Refuse.....R

3. In your own words, please tell me... What was the most important factor in your decision to become a SHIBA volunteer?

4. How satisfied are you with your work as a SHIBA volunteer? Would you say you are...?

Very Satisfied ..... 1  
Satisfied ..... 2  
Feel Neutral ..... 3  
Dissatisfied ..... 4  
Very Dissatisfied ..... 5  
Don't know ..... D  
Refuse.....R

5. Next I'm going to read a series of statements about your work as a SHIBA volunteer. Please tell me if you agree or disagree with these statements. There will be an opportunity later in the survey for you to provide additional information.

The first statement is I have received adequate training to do my volunteer work. Do you strongly agree, somewhat agree, feel neutral, somewhat disagree or strongly disagree with this statement?

Strongly agree..... 1  
Somewhat agree ..... 2  
Neutral ..... 3  
Somewhat disagree ..... 4  
Strongly disagree ..... 5  
Don't know ..... D  
Refuse.....R

6. (The next statement is) I have the tools and resources I need to do my volunteer work.  
(Do you...)

Strongly agree..... 1  
Somewhat agree ..... 2  
Neutral ..... 3  
Somewhat disagree ..... 4  
Strongly disagree ..... 5  
Don't know ..... D  
Refuse.....R

7. What do you like about being a SHIBA volunteer?
8. In your role as a SHIBA volunteer, what tools or resources do you find most helpful?
9. Do you have suggestions for changes or additions to SHIBA tools or resources?
10. Do you have any suggestions for changes to the SHIBA Program itself or the services it offers?
11. That completes our survey. We appreciate your time and cooperation. I want to thank you for helping us out. Do you have any additional comments or questions about the program or about this survey?



# APPENDIX B: DETAILED METHODOLOGY, CASE DISPOSITION AND RESPONSE RATES

## DETAILED METHODOLOGY

### Interview Design

Staff from the Social & Economic Sciences Research Center at WSU Pullman worked together with the SESRC Puget Sound office and staff at the Office of the Insurance Commissioner to finalize the telephone questionnaire.

SESRC worked in conjunction with investigators to produce the final interview script used for this study. Staff members from the SESRC programmed the interview into SESRC's Windows Computer Assisted Telephone Interviewing system (CATI). The CATI was tested by SESRC staff members and a final survey script with revisions was completed on February 4, 2010. During time tests, the average interviews lasted about 10 minutes, while some lasted longer, depending on how much information the respondent provided.

All interviewers working on this project were trained in proper interviewing, probing techniques, and the correct use of the computer assisted telephone interview (CATI) system used to record the answers as they are received during the telephone interview. Additional training was provided to each interviewer specifically for this study.

### Sample

Investigators at the Office of the Insurance Commissioner provided the SESRC with contact information for current SHIBA volunteers. The sample included active in-kind and unpaid volunteers. The sample was coded so that we could run reports to determine whether completed interviews came from unpaid or in-kind volunteers and control the sample to make sure that both groups were represented in the final data set. In cases where the respondent indicated that they were no longer a volunteer, or didn't consider themselves volunteers because they received payment and considered themselves to be staff members, we coded the cases out as ineligible.

### Interviewer Monitoring

To maintain data quality and continuity in the telephone data collection process, interviewer performance was regularly monitored and measured. SESRC's current standard is to monitor all interviewers at least once a week during a day or night shift. One of the main purposes of monitoring is to minimize interviewer effects. Interviewers are scored on specific factors that measure proper interviewing techniques. The two principles that guide the training and scoring of interviews are: (1) respondents should receive information that is delivered by the interviewer in an unbiased manner; and

(2) every respondent should receive the same stimulus from each interviewer. These principles translate into six basic interviewing rules that are used as factors by the monitor for scoring an interview:

- Rule 1: The reading of each question is exactly as it is written and in the order in which it appears in the questionnaire.
- Rule 2: Never skip a question.
- Rule 3: Accurate recording of all responses.
- Rule 4: Standard neutral feedback phrases such as “Thank you. That’s important information” or “I see” are given as acceptable responses.
- Rule 5: Standard neutral cues or probes such as “Could you tell me more about that” or which would be closer to the way you feel?” are given to the respondent to help him/her give more complete answers to questions.
- Rule 6: Accurately record the outcome of each call

Five percent of the telephone interviews (13 cases) were monitored by supervisory personnel, who are able to listen to interviews on the telephone as they are being conducted.

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## RESPONSE RATES & CASE DISPOSITION

We used the sample disposition calculations recommended by the American Association for Public Opinion Research (AAPOR) to calculate the final survey response rates for the survey. Of the 459 respondents included in the telephone sample, we completed 239 telephone interviews, for a 60% response rate and a 99% cooperation rate. We were able to reach the goal of completing interviews with at least 200, while ensuring that unpaid volunteers were not underrepresented in the final data.

We completed interviews with 184 of the 328 unpaid volunteers. Amongst in-kind volunteers, we completed interviews with 55 of the 131 included in the sample. Most respondents were happy to participate in the survey, which helped us achieve such high cooperation and response rates. As volunteers for the SHIBA program, most people we were able to contact were very willing to help ensure that this project was a success.

Ultimately, 32 people were deemed ineligible for the study. Most of these people indicated that they were no longer volunteers in the SHIBA program. There were also a number of people who didn’t consider themselves volunteers because they receive some kind of payment. These respondents may be in-kind volunteers. Interviewers were instructed to work with the respondent to determine whether this was the case. In cases where the individual was reluctant to respond because the survey uses the term “volunteer”, and they didn’t identify as such, the respondent was considered ineligible.

The following table displays the response rate calculations for all completed questionnaires received both by mail and completed online. In addition to the 239 completed or partially completed interviews, 32 indicated he/she were not current volunteers, or didn't consider themselves volunteers because they receive payment. The overall response rate (completed and ineligible questionnaires divided by the total sample size) is 60%.

	Total	In-Kind	Unpaid
Completed Interviews	239	55	184
Partials	0	0	0
Refusals - Hang ups	0	0	0
Hard refusals	3	1	2
Ineligible	32	14	18
General Call-backs	1	0	1
Busy	1	0	1
Answering Machine	145	48	97
No Answer	8	2	6
Communication Barrier	1	0	1
Electronic Device	1	0	1
Respondent Never Available	2	1	1
Physically or mentally unable	0	0	0
Deceased	0	0	0
Language Barrier	0	0	0
Temporarily Out of Order	7	2	5
Disconnected	10	3	7
Wrong Number	7	4	3
Missing Phone Number	2	1	1
Other Cases	0	0	0
Duplicates	0	0	0
Total Sample Imported	459	131	328

Cooperation Rate	99%	98%	99%
Adjusted Response Rate	60%	52%	63%
Average Call Attempt	4		
Cases Monitored	13		
Percentage Monitored	5%		
Number of Interviewers	16		